

Message Text

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ACTION AGR-20

INFO OCT-01 EUR-25 NEA-14 ISO-00 SWF-02 IO-14 IGA-02

AID-20 CIAE-00 COME-00 EB-11 FRB-02 INR-10 NSAE-00

RSC-01 TRSE-00 XMB-07 OPIC-12 SP-03 CIEP-02 LAB-06

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FM AMEMBASSY TUNIS

TO SECSTATE WASHDC 5632

INFO AMEMBASSY MADRID

AMEMBASSY RABAT

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TAGS: EAGR, TS

SUBJECT: WORLD FERTILIZER SITUATION: PRODUCTION OF
PHOSPHATE AND DEIVATIVES

REF: STATE 090131

1. FOLLOWING RESPONSE TO REFTEL NUMBERED IN ACCORANCE
PARAS THAT MESSAGE. ADDITIONAL DETAILED INFORMATION
AVAILABLE FROM IBRD WHICH HAS MADE LONG DETAILED STUDIES OF
PHOSPHATE ROCK INDUSTRY NOT AVAILABLE HERE: TUNIS A-71:
INDUSTIRLA OUTLOOK REPORT; REPORT OF APRIL 29, 1974,
CONFERENCE ON PHOSPHATES IN GENEVA SPONSORED BY UNCTAD:
AND SPEICIAL FAO STUDY FOR 18TH CONFERENCE IN FEB 1973:
ACL/FP/73/6.

2. PRODUCTION OF PHOSPHATE ROCK (ROUGHLY 28 PERCENT P2O5
OR 65 PERCENT BPL) IN 1000 METRIC TONS BY CALENDAR YEARS
AS FOLLOWS: 1972 (ACTUAL) - 3297; 1973 (ACTUAL) - 3473;
1974 ESTIMATED) - 3600. FOUR MINES OPERATED BY SFAX-GAFSA
COMPANY AND GOT-OWNED MINE AT KALAA DJERBA (SOCIETE
TUNISIENNE D'EXPLOITATION PHOSPHATIERE) REPORTEDLY PRODUCING
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AT MAXIMUM CAPACITY OF 3.6 MILLION TONS YER YEAR, WHICH IS

ALSO MAXIMUM CAPACITY OF TRANSPORTATION SYSTEM. PORT LOADING CAPACITY AT SFAX WILL BE 3.5 MILLION MT UPON REPLACEMENT IN ABOUT THREE MONTHS OF BROKEN 1250 MT/HOUR AUTOMATIC LOADER. CAPACITY AT L BGOULETTE PORT NEAR TUNIS FOR KALAA DKERBA MINE IS 300,000 MT.

3. SFA/GAFSA COMPANY PLANNING UNDERTAKE FOLLOWING PROJECTS TO EXPAND PRODUCTION OF PHOSPHATE ROCK (65 PERCENT BPL) TO AROUND 6 MILLION MT BY 1977, ROUGHLY ONE-THIRD TO BE PROCESSED LOCALLY (AS AT PRESENT) AND REMAINDER TO BE EXPORTED ON WORLDWIDE BASIS. PRIMARY BUILDER IS REPORTEDLY OWNER SFAX/GAFSA IN COOPERATION WITH ENGINEERING FIRMS SHOWN.

A. MRATA: DEVELOPMENT UNDERWAY IN COOPERATION GEOMINES COMPANY OF ROMANIA; PRODUCTION STARTED IN 1975 AT 600,000 MT RISING TO MAXIMUM OF 1 MILLION MT IN 1977.

B. SEHIB (PROBABLY TO BE FINANCED BY IBRD) PROJECT TO START IN EARLY 1975 IN COOPERATION WITH FRENCH COMPANY HEURTEY; PRODUCTION OF 1.2-1.6 MILLION MT TO START IN 76/77 AND REACH 1.6-2 MILLION MT IN 77/78.

C. KEF ESCHFAIR: STILL UNDER CONSIDERATION BUT IF UNDERTAKEN IS EXPECTED TO START PRODUCTION OF 1.5 MILLION MT BY 1978-80 AND REACH 2.5-3 MILLION MT BY 1980-83.

D. PROJECTS ARE ALSO IN PLANNING STAGE TO MODERNIZE OLD MINES (METLAOUI, REDAYEF, MONLARES AND MDILA) IN ORDER MAINTAIN PRODUCTION AND LOWER EXTRACTION COSTS. PROJECTS HAVE BEEN STUDIED BY IBRD BUT WILL PROBABLY BE FINANCED BY KUWAIT FUND.

4. PRODUCTION IN 1000 MT PER CALENDAR YEAR OF FOLLOWING PHOSPHATIC FERTILIZERS AND PHOSPHORIC ACID:

	1972	1973	1974(EST)
TRIPLE SUPERPHOSPHATE (TSP			
47 PERCENT P ₂ O ₅	411	415	453
SIMPLE SUPERPHOSPHATE (16			
PERCENT P ₂ O ₅)	42	50	50

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HYPERPHOSPHATE (28 PERCENT P ₂ O ₅)	8	20	70
PHOSPHORIC ACID (54 PERCENT			
P ₂ O ₅)	60	93	120

MAXIMUM PRESENT CAPACITY EQUIVALENT TO 1974 ESTIMATED PRODUCTION EXCEPT FOR HYPERPHOSPHATE WHICH COULD PRODUCE OVER 100,000 MT/YEAR IF IT HAD MARKET FOR WHAT IS ESSENTIALLY FINELY GROUND PHOSPHATE ROCK.

5. PROJECTS TO INCREASE PRODUCTION AS FOLLOWS:

SIAPE - PLANS TO INCREASE PRODUCTION TO ABOUT 300,000 MT/YEAR OF TSP LARGELY BY INSTALLING MODERN SULFURIC ACID PLANT WITH 950 MT/DAY CAPACITY IN PLACE OF THREE SMALLER UNITS.

NPK - WILL INCREASE TO 210,000 MT/ YEAR TSP CAPACITY BY MID-1976 BY EXPANDING SULFURIC ACID PLANT TO 720 MT/DAY AND IMPROVING PHOSPHORIC ACID FACILITY.

GRANUPHOS - COMPANY IN WHICH FRENCH REYNAUD RECENTLY TOOK 30 PERCENT PARTICIPATION WITH GOT, PLANS MAINTAIN PRODUCTION OF FINELY GROUND HYPERPHOSPHATE AT 60,000 MT/YEAR AND BUILD NEW PLANT PRODUCING GRANULAR HYPERPHOSPHATE ON FOLLOWING SCHEDULE : 1975 - 40,000 MT; 1976 - 80,000 MT; 1977 - 100,000 MT.

ICM- COMPANY PLANS TO BRING FIRST PHOSPHORIC ACID UNIT UP TO 120,000 MT CAPACITY BY 1975. SECOND UNIT (BEING BUILT BY FRENCH COMPANY HEURTEY) TO START OPERATION IN SECOND HALF OF 1974 WITH 20,000 MT TO BE PRODUCED INCREASING TO 120,000 MT MAXIMUM CAPACITY IN 1977. SECOND UNIT TO HAVE FACILITY CAPABLE OF TREATING PHOSPHATE ROCK TO PRODUCE 250 MT/DAY OF DOUBLE SUPERPHOSPHATE (39 PERCENT P₂O₅). PRODUCTION TO START IN 1974 AND REACH PLANNED PRODUCTION OF 75,000 MT/YEAR IN 1977.

CRC - US CENTRAL RESOURCES CORP. THROUGH DUTCH SUBSIDIARY WINDMILL HOLLAND PLANS TO BUILD 120,000 MT/YEAR MONO-AMMONIUM PHOSPHATE (MAP) PLANT WHICH WILL BEGIN INITIAL PRODUCTION IN 1976. PLANT WILL USE 50,000 MT/YEAR PHOSPHORIC ACID FROM ICM-2 AND IMPORT AMMONIUM. WINDMILL TO BE RESPONSIBLE FOR CONSTRUCTION WHICH IS EXPECTED TO START IN 1974 ALTHOUGH PRIMARY BUILDER NOT YET ANNOUNCED: UNCLASSIFIED

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RATE AT WHICH FULL PRODUCTION TO BE REACHED NOT KNOWN.

MAJOR RAW MATERIAL FOR ALL ABOVE PLANTS IS LOCAL PHOSPHATE ROCK AND IMPORTED SULFUR FROM WHEREVER IT CAN BE OBTAINED AT LOWEST PRICE (POLAND, U.S., CANADA, FRANCE, ETC.) EXPANSION PLANS WILL REQUIRE ADDITIONAL 600,000-650,000 MT/YEAR OF PHOSPHATE IN ADDITION TO APPROXIMATELY 1.2 MILLION MT/YEAR NOW UTILIZED. WHILE WESTERN EUROPE IS NATURAL MARKET FOR FINAL PRODUCT, OVER 90 PERCENT OF WHICH IS EXPORTED, TUNISIA ALSO SHIPS FERTILIZERS TO OTHER AREAS.

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